ProjectWise Deliverables Management (PWDM)

User Training

Externally Initiated

External Participants – Creating/Issuing Submittals (Web Portal)

> **NOTE:**
> **Organization** = Company registered with Bentley
> **Transmittal** = Data sent outside of organization (Outgoing)
> **RFI**= Request For Information
> **Submittal** = Data received into an organization (Incoming)
> **Participants** = Someone assigned to a project. Can be an internal or external participant
> **Draft** = A partially completed package that can be edited prior to being transmitted
> **Package** = Proposed set of documents being transmitted or submitted
>
> Remember: The sending user issues a *Transmittal*, and the receiving user receives a *Submittal*.

1. To access Bentley's Web portal go to http://www.connect.bentley.com.

   If you already have a Bentley account and have accepted an invitation to participate on a project.

   a. Enter your *Email Address*.
   b. Enter your *Password*.
   c. Click *Sign In*.


2. You will be taken to the *Personal Portal*

3. From *Recent Projects*, select which CONNECTED project you want to access.
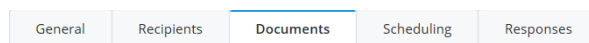4. Click on the project to be taken to the project portal.
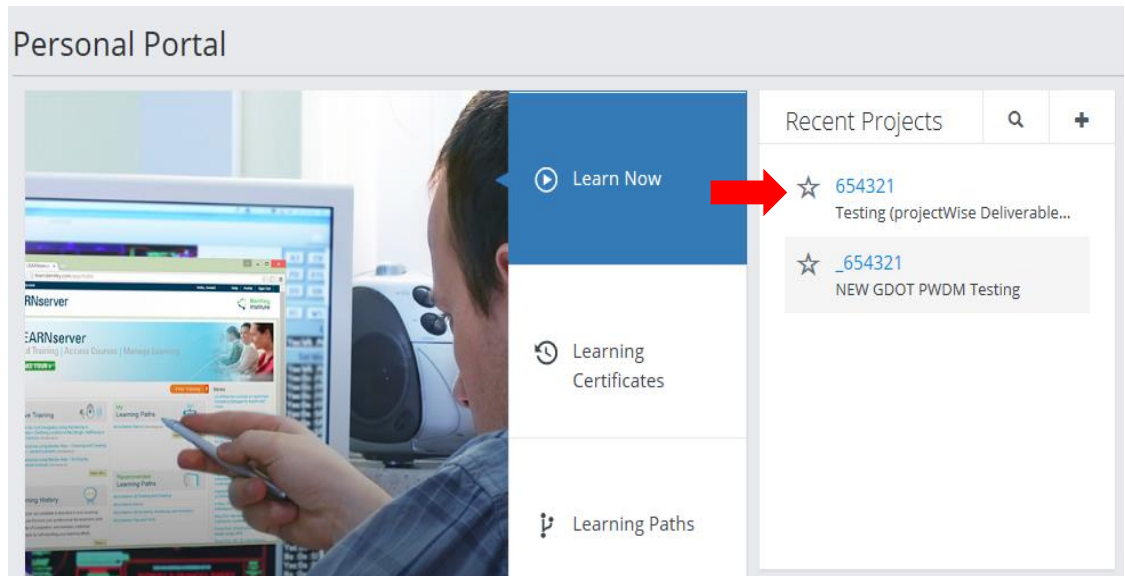
5. From the **Project Portal**, click on the **ProjectWise Deliverables Management** module.
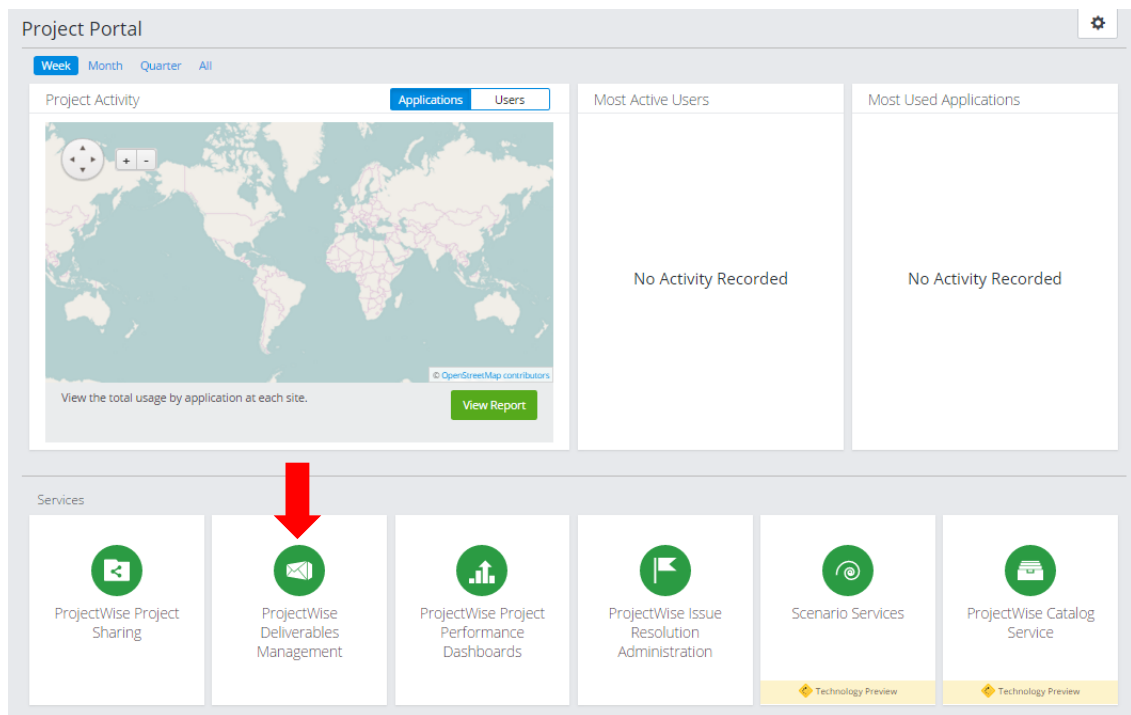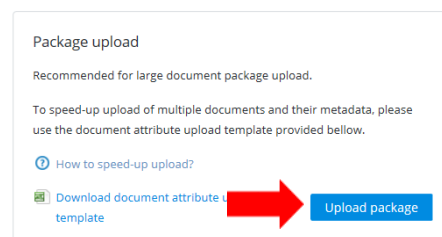

6. You are now ready to start exchanging deliverables with project participants of this project.

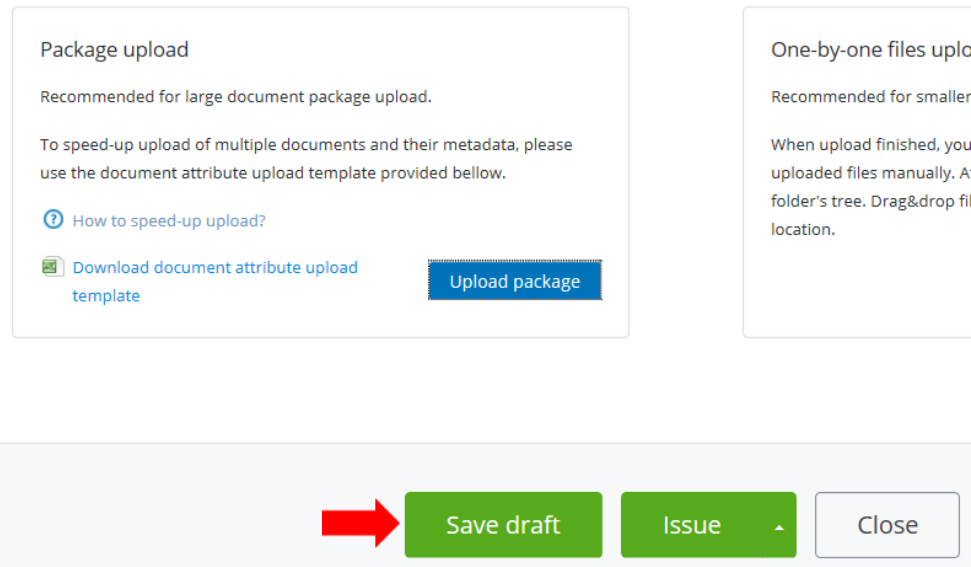7. While at the project portal, click **New Transmittal**.
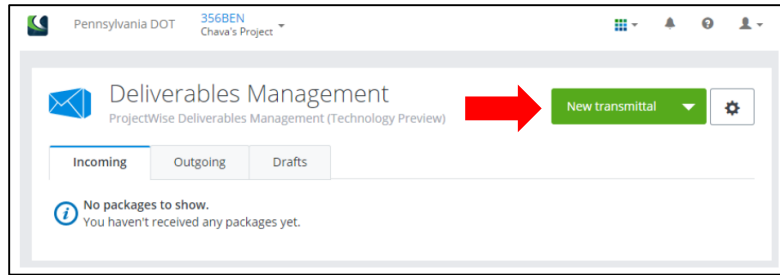
8. The transmittal draft form opens.

9. On the *General* tab, enter the following:
   a. *Subject* – Enter brief title describing package.
   b. *Purpose* – Select a purpose from the pulldown list.
   c. *Comments* - Provide an overall comment about the package (Optional).
   d. *Cover Letter* – Either leave the default cover letter or select one from list (Optional).
   e. *Classifications* – Select a classification from the list (Optional).

10. On the *Recipients* tab, select which internal and external project participants you want to send this transmittal to.
    a. Select *Add recipients*.
    b. Select *Show Internal* or *External*.
    c. Click on recipient, click **Add Selected**.
    d. Select *Ack* or *Resp* to require recipient to acknowledge or respond or both.
    e. Enter a comment for the recipient (Optional).

11. On the *Documents* tab,

    a. **Package Upload** (through a ZIP file)

       i. Select **Upload Package** for large document package uploads. You must create a ZIP file containing the files you want to upload. You will be prompted to browse for the ZIP file.

ii. You will be prompted to save the submittal as a draft. Click on **Save Draft**.

Package upload

Recommended for large document package upload.

To speed-up upload of multiple documents and their metadata, please use the document attribute upload template provided bellow.

② How to speed-up upload?

📊 Download document attribute upload template

Upload package

One-by-one files uplo

Recommended for smaller

When upload finished, you uploaded files manually. A folder's tree. Drag&drop fil location.

Save draft Issue ▲ Close

iii. Click on **Upload Package** again.

iv. In the *Upload Package* dialog, browse for the ZIP file containing the files you want to include in the submittal, select it, click **Open**, and then **Upload Package**.

b. **One-by-one file upload**

i. Click on **Add files…**

One-by-one files upload

Recommended for smaller document packages.

When upload finished, you will be required to enter all the metadata for uploaded files manually. After uploading files you can optionally create folder's tree. Drag&drop files to the appropriate folders to change their location.
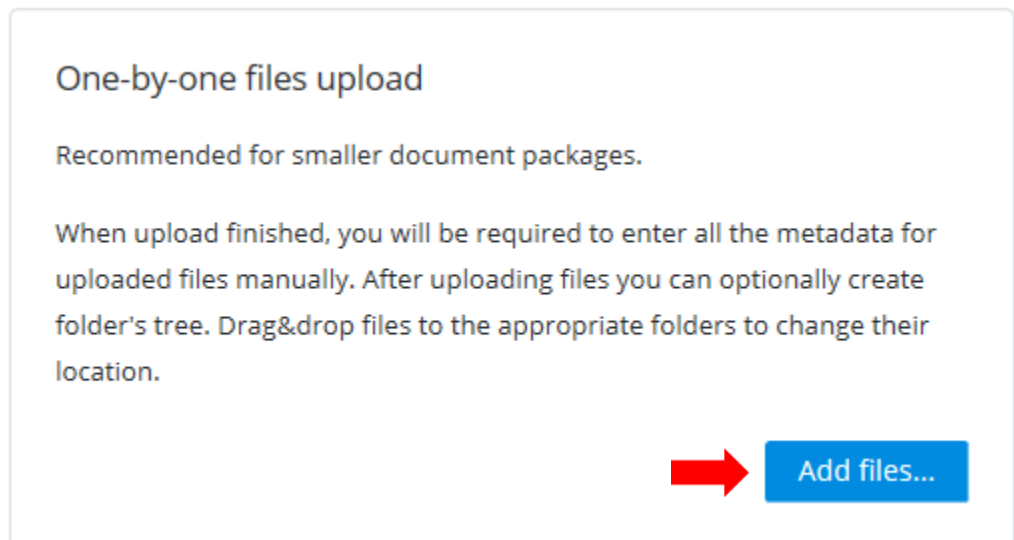
Add files…

ii. Select the desired files and click on **Open**.

12. On the **_Scheduling_** tab,

    a. **_Select an Issue Date_** – Date you want the package issued to the recipient

        i. Set reminder date to be reminded to issue the package.

    b. **_Select an Acknowledge Date_** – Date you want the package acknowledged by recipient

        i. Set reminder date to notify recipient to acknowledge package.

    c. **_Select a Response Date_** – Date you want to receive response from recipient

        i. Set reminder date to be reminded to issue package.

13. To issue transmittal package:
    a. Select **_Save Draft_** if your transmittal is not ready to be transmitted. This will save your transmittal and make it available for editing later.
    b. Select **_Send for Review_** in the dropdown menu next to **_Issue_** to send the transmittal for review by internal participants before issuing.
    c. Select **_Issue_** from the bottom of the dialogue box and then **Confirm**.

Internal Participants – Receiving Submittals

> **NOTE:**
> **Organization** = Company registered with Bentley
> **Transmittal** = Data sent outside of organization (Outgoing)
> **RFI**= Request For Information
> **Submittal** = Data received into an organization (Incoming)
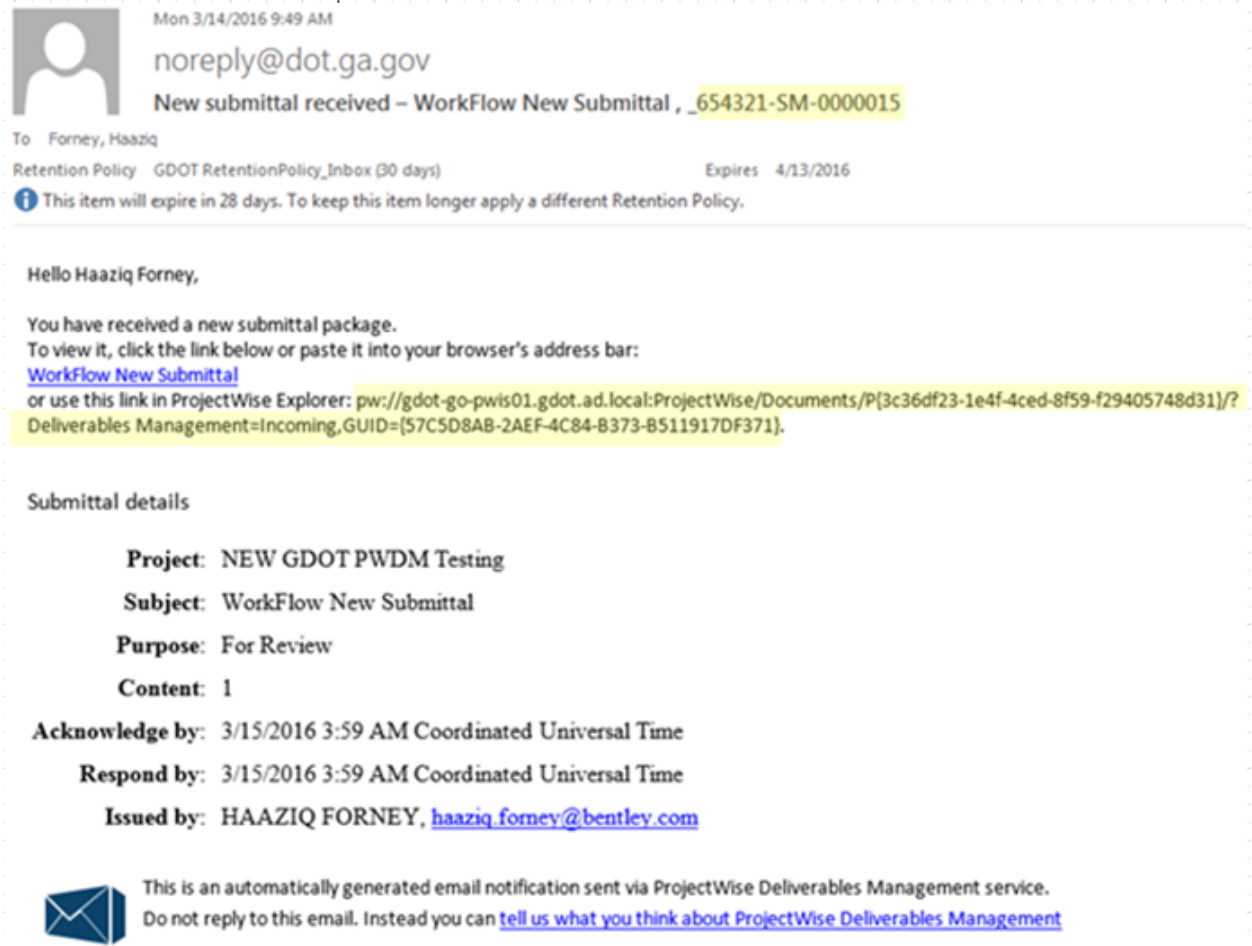> **Participants** = Someone assigned to a project. Can be an internal or external participant
> **Draft** = A partially completed package that can be edited prior to being transmitted
> **Package** = Proposed set of documents being transmitted or submitted
>
> Remember: The sending user issues a ***Transmittal***, and the receiving user receives a ***Submittal***.

1. When receiving submittals, you will be notified via Microsoft Outlook that a new submittal package has been received.

2. To open the package from the email notification, click the link next to *"Or use this link in ProjectWise Explorer".* This will launch your ProjectWise client and will take you to the package. If the link is not clickable, copy/paste the link into *ProjectWise Explorer's* address bar and press enter. Notice the submittal *ID654321-SM-0000015.*

Mon 3/14/2016 9:49 AM

noreply@dot.ga.gov

New submittal received – WorkFlow New Submittal , _654321-SM-0000015

To   Forney, Haaziq

Retention Policy   GDOT RetentionPolicy_Inbox (30 days)   Expires   4/13/2016

ⓘ This item will expire in 28 days. To keep this item longer apply a different Retention Policy.

Hello Haaziq Forney,

You have received a new submittal package.
To view it, click the link below or paste it into your browser's address bar:
WorkFlow New Submittal
or use this link in ProjectWise Explorer: pw://gdot-go-pwis01.gdot.ad.local:ProjectWise/Documents/P{3c36df23-1e4f-4ced-8f59-f29405748d31}/?
Deliverables Management=Incoming,GUID={57C5D8AB-2AEF-4C84-B373-B511917DF371}.

Submittal details

Project:	NEW GDOT PWDM Testing
Subject:	WorkFlow New Submittal
Purpose:	For Review
Content:	1
Acknowledge by:	3/15/2016 3:59 AM Coordinated Universal Time
Respond by:	3/15/2016 3:59 AM Coordinated Universal Time
Issued by:	HAAZIQ FORNEY, haaziq.forney@bentley.com

This is an automatically generated email notification sent via ProjectWise Deliverables Management service.
Do not reply to this email. Instead you can tell us what you think about ProjectWise Deliverables Management

1. The new submittal package will be highlighted. Click the package.

2. From the *General* tab, review the cover letter to verify expected contents by clicking on the cover letter PDF hyperlink.

3. In the bottom right corner of the dialogue box, ***Acknowledge*** the package. This will import all files to the ProjectWise Client into the project's pre-configured submittal documents folder under the organization that sent the package.
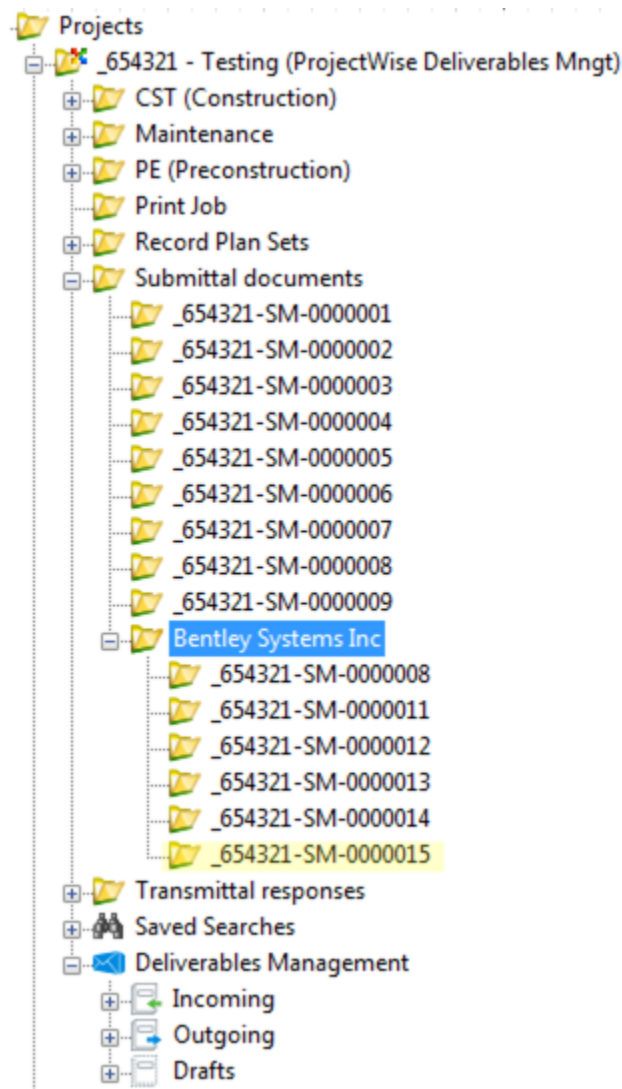
4. To easily navigate to the folder containing the files, click on the **Documents** tab and click on the **Go To Folder** button in the bottom right corner.

5. In the submittal folder, select all files, right-click, select **New→Version**. Enter current date as the version name: **03242016**, click **Ok**. This step will keep the original submitted files intact.

6. Perform a detailed review by opening the new versioned files from the submittal folder and begin commenting or marking up the file. Be sure to Check-In your files when exiting so your comments are saved within the document.

7. Navigate to the **Incoming→Submittals** section under the ProjectWise Deliverables Management module for your project. Double-click the package.

8. On the **Recipients** tab, click **Start Responding** in the last column on the right labeled *View Response*.

9. You're taken to the *My Response* tab,
   a. Select a document to respond to. The *"Comment"* box opens.
   b. Type a general comment referring the recipient to review the attached document containing comments.
   c. Select *Browse* to browse to the submittal folder to select the *03242016* versioned documents and select *Open* to attach them to the package.

10. When the Non-versioned Document dialog appears, click *Yes*.
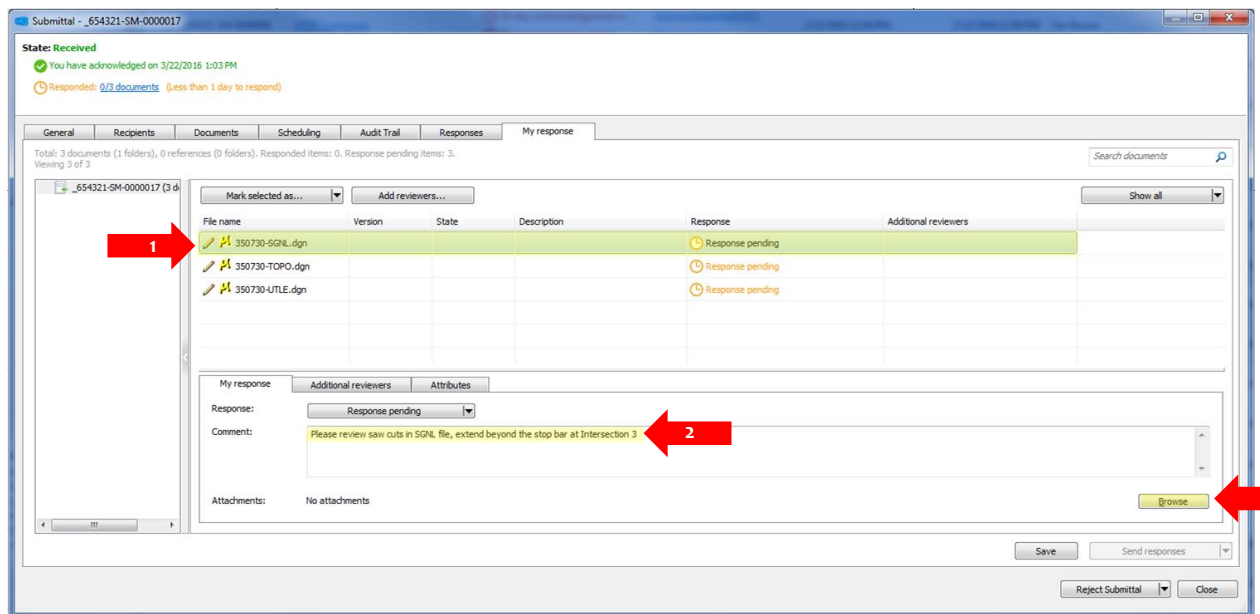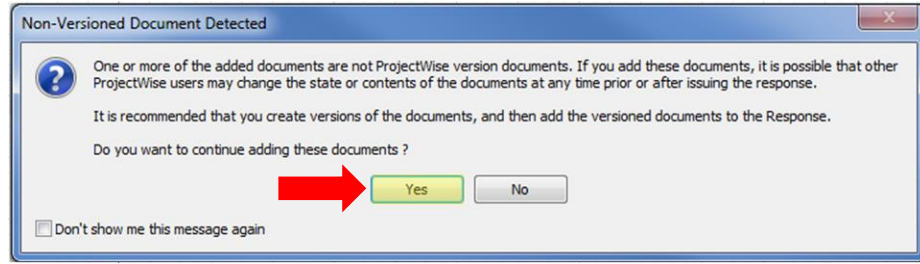
11. Select a document.
    1. Choose the appropriate response by using pre-loaded comments from *Mark selected as* dropdown menu or from the *Response* dropdown as shown below.
    2. When all documents are marked with the appropriate response, select *Send Responses*.
   3. Click *Close*.
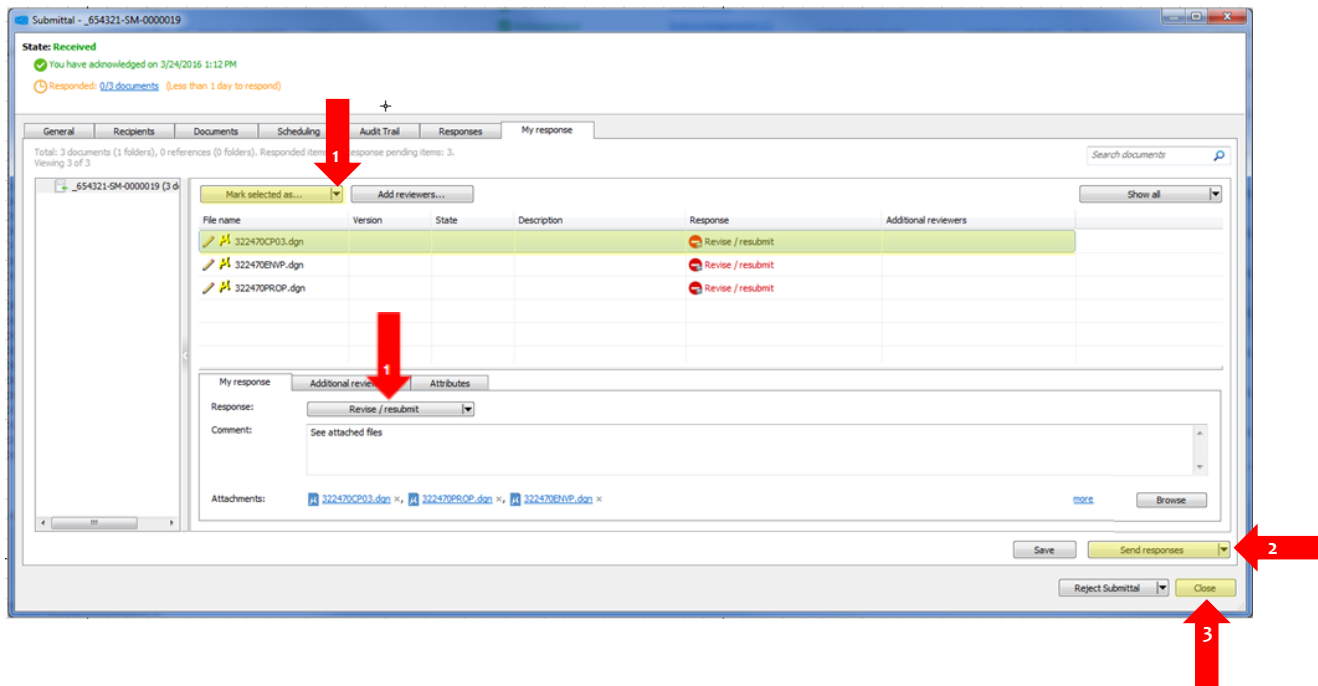
12. After a detailed review has completed, navigate to the submittal folder for the package, select all files that were submitted, drag/drop them to the correct folder location of where they will reside within the project folder structure.
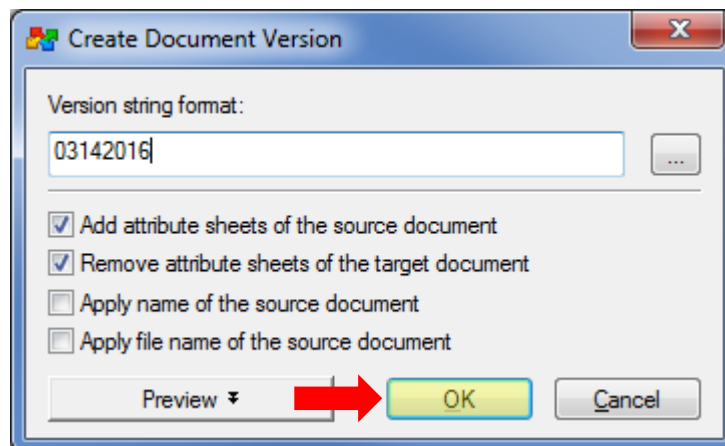
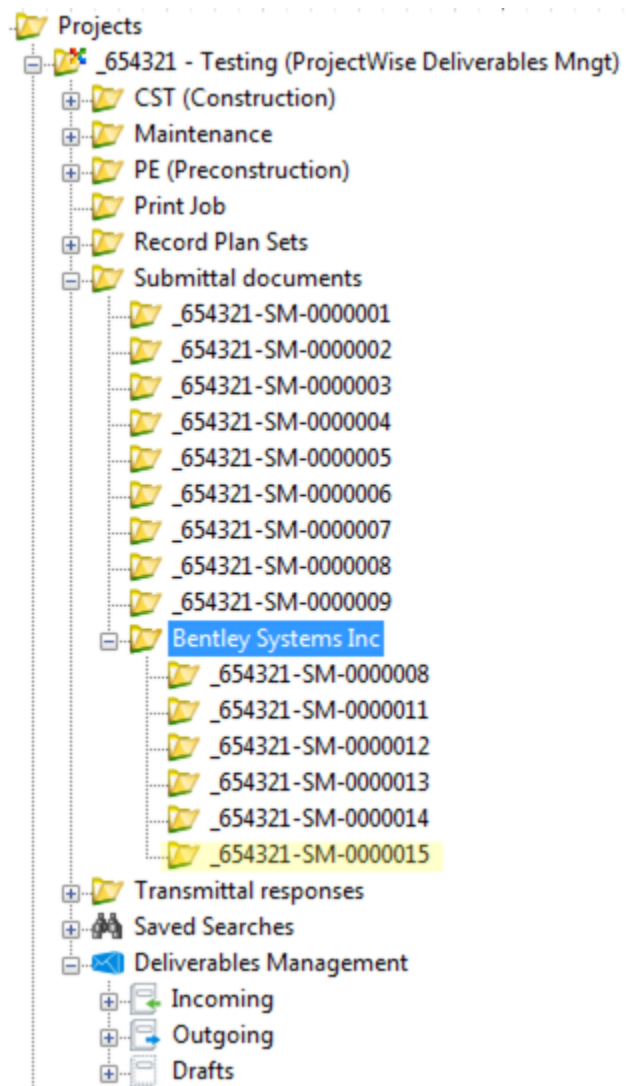13. When prompted to select a Wizard, choose No Wizard, choose *Ok*.
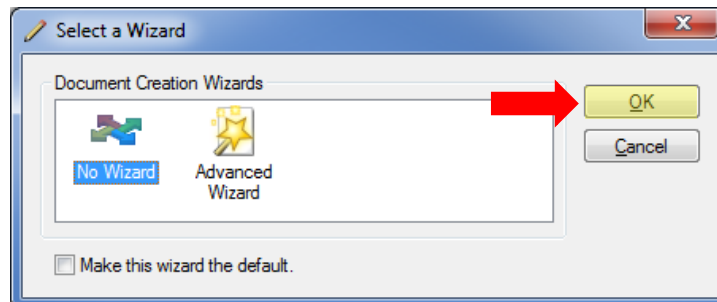
14. On *"Select an Action dialogue box"*, choose Create a **New Version of Existing Document.**
    Click **Ok.**
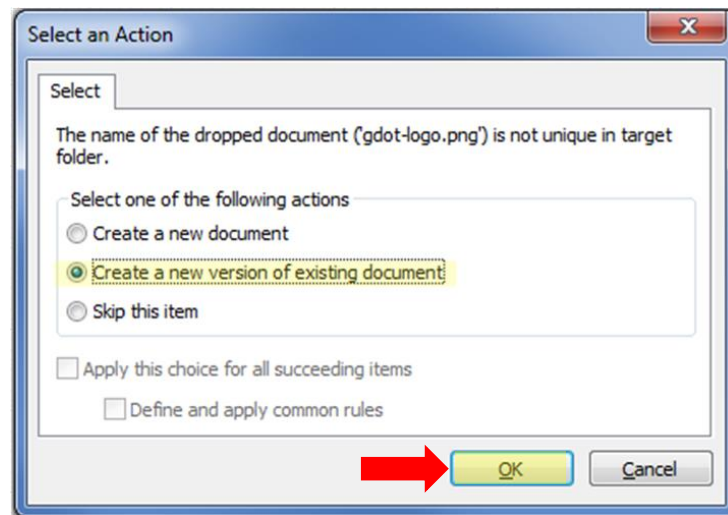
15. Enter current date as the version name. Click **Ok**.

16. Navigate back to the current submittal folder under the organization and delete it.

External Participants – Receiving Responses

> **NOTE:**
> **Organization** = Company registered with Bentley
> **Transmittal** = Data sent outside of organization (Outgoing)
> **RFI**= Request For Information
> **Submittal** = Data received into an organization (Incoming)
> **Participants** = Someone assigned to a project. Can be an internal or external participant
> **Draft** = A partially completed package that can be edited prior to being transmitted
> **Package** = Proposed set of documents being transmitted or submitted
>
> Remember: The sending user issues a *Transmittal*, and the receiving user receives a *Submittal*.

1. When receiving requests to be an additional reviewer, you will be notified via Microsoft Outlook.

Hello Glenn Williams,

All responses have been received from all recipients for the transmittal package portal test, 654321-TR-0000003.

To view the transmittal response status, click the link below or paste it into your browser's address bar:
portal test

Transmittal details

Project:	Testing (projectWise Deliverables Mngt)
Subject:	portal test
Purpose:	For Review
Content:	1
Acknowledge by:	4/1/2016 11:44 AM Coordinated Universal Time
Respond by:	4/13/2016 11:44 AM Coordinated Universal Time
Issued by:	Glenn Williams, glennlaurawilliams@gmail.com

This is an automatically generated email notification sent via ProjectWise Deliverables Management service.
Do not reply to this email. Instead you can tell us what you think about ProjectWise Deliverables Management

2. To open the package from the email notification, click the link in the email.

Hello Glenn Williams,

All responses have been received from all recipients for the transmittal package portal test, 654321-TR-0000003.

To view the transmittal response status, click the link below or paste it into your browser's address bar:
portal test ⬅

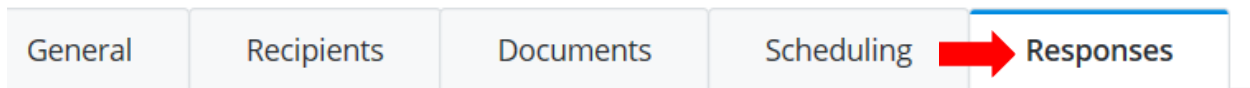3. When your browser opens, sign in with your Bentley account (if applicable).

      a. Enter your Email Address.

      b. Enter your *Password*.

      a. Click *Sign In*.

4. After successfully logging in, the ProjectWise Deliverables Management portal for the project will open.
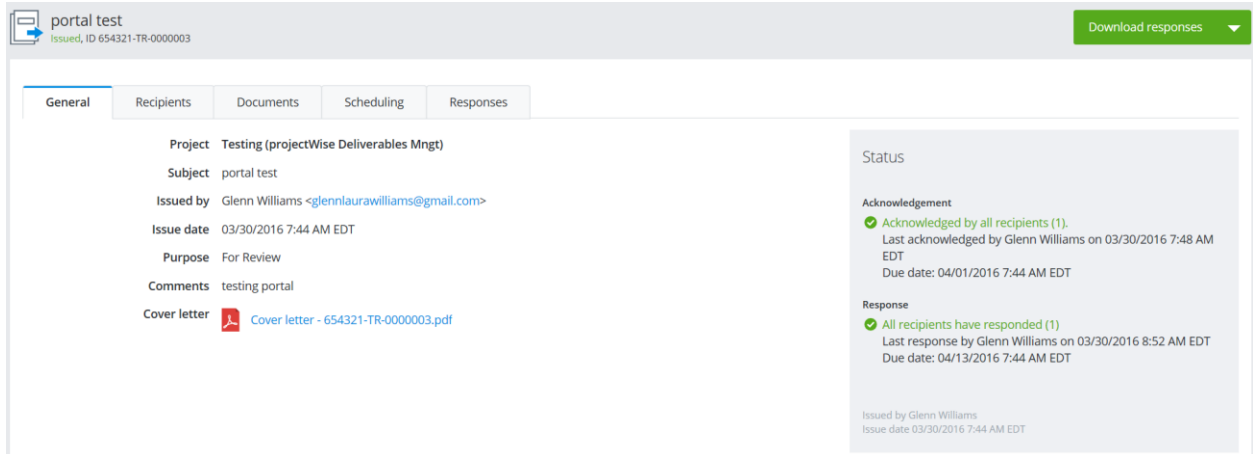
5. Click on the **Responses** tab to see the responses.

6. Click on the plus sign ("**+**") beside each file to see the response for that file.

7. Click on **Download Responses** to download all files to your PC/server.